

CableVision

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FOR CABLE TELEVISION MA

DOLAN HITS
HIS STRIDE

URBAN GMS TELL
WHAVERS IN STORE

TIME TO REFINISH
BYPASS BUSINESS

MEETINGS
HOW HEIGHTS UP

PROVING THAT A GOOD INDUSTRY CAN BE BETTER

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Operator of the Year Amos Hostetter
with Atlantic Show keynoteer Bill Daniels

CableVision

INFORMATION AND ANALYSIS FOR CABLE TELEVISION MANAGEMENT

OCTOBER 23, 1989

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Photo by Arrie Adler

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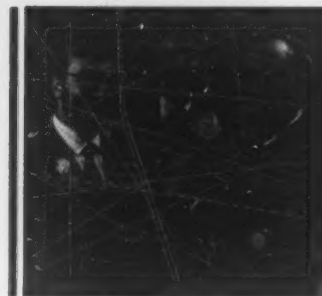
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ABP V BPA

The CABLE POLL

Midwest CATV & CableVision Magazine

GMs: We can get the job done

Although the job of running a cable system presents a myriad of daunting challenges, system managers express a quiet confidence in their abilities to meet the increasing burdens placed on them by corporate headquarters and by the rising expectations of a demanding public. Nearly 400 of them were interviewed by the Cable Poll™, and the vast majority said they feel they are succeeding in managing the four critical areas of system operations—staying within budget and meeting profit projections, achieving goals set in the current marketing plan, dealing with MIS and billing systems, and hiring and training a diverse staff.

Of the four, marketing apparently presents the toughest challenge for system managers, with 12 percent of respondents saying it is very difficult to achieve the goals mandated by corporate, and 40 percent saying it is somewhat difficult. Dealing with MIS and billing issues, on the other hand, is a snap. Only 26 percent said that is a very difficult or somewhat difficult management issue.

Probably because it is related to marketing, staying within budget and meeting profit margin projections also is a tough nut for system managers. Nearly half of Cable Poll™ respondents said staying abreast of the cash flow demands placed on them is very or somewhat difficult. Only about one in six system managers said delivering expected profit margins is not difficult at all.

Number

3

in a series
of ten

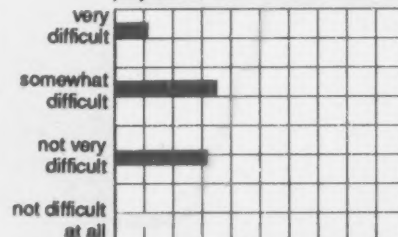
Surprisingly, system managers say hiring, training and managing a workforce is less of a problem than many other tasks they confront. Only one in 10 said it's a big problem, while more than half said they have very few or no problems at all with their staffs.

In fact, managers say the issues surrounding hiring, training and managing a staff have become easier to handle. Compared with a couple of years ago, 41 percent said employee issues—especially those related to wages—have gotten better. Only 9 percent said they have gotten worse.

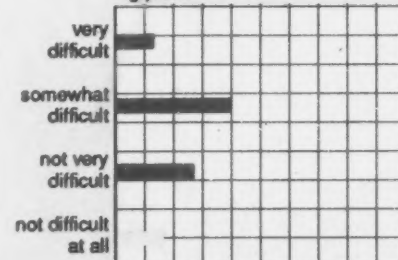
System managers are about evenly split as to whether the resources they get from corporate are adequate to achieve the goals corporate sets. Forty-four percent said that, given the resources they are given, it is very difficult or somewhat difficult to meet plan, while 52 percent said they receive adequate resources.

The Cable Poll™ is conducted for Midwest CATV and CableVision magazine by Ryan/Samples Research. Telephone interviews for this edition of the poll were conducted Aug. 14-19 with a random sample of 387 system management personnel obtained from CableFile Research. Cable Poll™ researchers are 95 percent confident that the results are an accurate reflection of the total industry within plus or minus 5 percentage points. ■

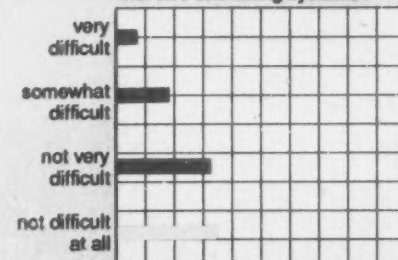
How hard is it for you to stay within budget and meet profit margin projections?



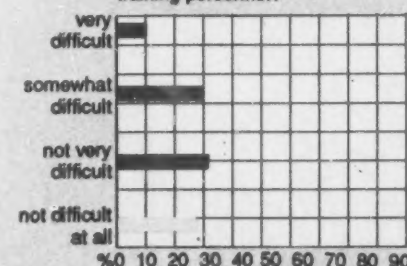
How hard is it for you to achieve the goals in your current marketing plan?



How much of a problem is dealing with MIS and billing systems?



How much of a problem is dealing with wage issues and hiring and training personnel?



ADVERTISING

Bullish analysts predict soaring billings; some feel CPMs may catch up with broadcast

By Larry Jaffee

The New York Times wasn't specifically talking about the cable industry, but may as well have, when in a recent page-one article on the profound changes on Madison Avenue it commented on "the splintering of the mass market into hundreds of smaller markets, and the development of new ways of communicating them."

The Cabletelevision Advertising Bureau, citing figures projected by Paul Kagan Associates, estimates that total cable ad billings next year will hit \$2.365 billion, compared to \$1.963 billion this year, a 21 percent increase. The 1990 figure breaks down to: cable networks, \$1.646 billion, up 18 percent; national/local spots, \$620 million, up 27 percent; and regional spots, \$100 million, up 35 percent.

"Cable today appears to have limitless growth potential as its share of audience and advertising revenues grow and as new networks continue to thrive in an extremely competitive environment," according to a report by Myers Marketing & Research funded by 16 cable networks.

This year the upfront ad market for cable blossomed with sales increases ranging from 25 percent to 400 percent, the report stated, noting that 1988 was the first time cable experienced an upfront season.

Sixty-five percent of respondents

1989 NATIONAL ADVERTISING OUTLOOK

(Measured in billions)

Media	Percent Over 1988	Dollars
Network TV	+ 1	\$ 9,265
Cable TV	25	1,180
Syndicated TV	25	1,125
Spot TV	5	7,505
Network Radio	10	465
Spot Radio	9	1,545
Magazines	10	6,680
Newspapers	3	3,695
Direct Mail	10	23,225
Yellow Pages	10	1,040
Other Media	7	14,875
TOTAL MEDIA	7.6	70,600

Source: McCann-Erickson

to Myers 1989 Survey of Advertising Executives believe that increased activity in a cable upfront market will have a significant continuing impact on the media industry.

According to the Myers report, cable subscriber/ratings growth and continued broadcast audience erosion also will have a significant impact on media decisions. The survey also found that cable network cost-per-thousand (CPM) will increase an average of 13.5 percent in 1989 after years of remaining constant in a minimal growth mode.

"The cable networks continue to sell many more commercials and in a number of cases they have been able to command significant rate increases for some of their inventory," said Robert Coen, senior vice president and director of forecasting

at McCann-Erickson, the advertising industry's forecast guru, in his June *Insider's Report*.

"Commercial time in selected programs that have shown good audience growth in the last 12 months is now beginning to command considerably higher prices. We expect another year of high double-digit growth for cable network ad revenue in 1989," said Coen, noting that 1989's first quarter jumped 41 percent over the 1988 period.

While he hasn't begun working on 1990 projections, Coen said he anticipates next year to be much like 1989, although he wonders whether cable will maintain such significant growth levels. "It has got to come down; it's not sustainable," said the McCann-Erickson executive, who will be revealing his report for next year at the Paine Webber media conference in December.

Forty-four percent of the respondents to the Myers survey stated that network merchandising tie-ins would have an impact on their media decisions during the next 12 months. In 1988, less than 25 percent considered tie-ins to have an important influence on media decisions.

In 1988 and 1989, cable networks experienced the benefits of demand for the first time. "Our research

1989 CABLE NETWORK AD REVENUES

(Percent change over 1988)

January	+27
February	+28
March	+66
First quarter	+41
April	+27
First four months	+36

Source: McCann-Erickson

confirms that demand will increase in future years even though new networks are adding inventory," Myers said.

In 1989, due to the higher-than-expected broadcast network CPM increases, agencies pressured cable networks to maintain or lower their CPMs, in order to deliver lower overall increases to their clients. "Recognizing the inevitable long-term trend toward increased cable CPMs, several agencies are offering cable networks long-term deals—as long as five years," the report said.

Myers also predicted that within the next five years, cable network CPMs will achieve parity with the broadcast networks and that some cable networks will be sold at a premium over broadcast costs.

Acquisition of major sporting events is viewed by advertisers and agency executives as the No. 1 opportunity for contributing to substantial future growth of cable ad revenue, according to the Myers report.

A possible cable advertising trend for 1990, noted Jonathan Sims, CAB vice president of research, is the tactic by operators to give away second and third-set converter boxes. "Ratings go up when you hook up multiple sets. The analysis is that while there is a trade-off in giving

away converter boxes, there is a boost in advertising revenue with the increased ratings," Sims pointed out.

Although cable is found in 57 percent of U.S. households, only 39 percent of the country's TV sets are hooked up. "There's tremendous upside leverage," he added.

A second trend identified by Sims is a standardization of demographics and day part ratings for cable, so that media planners can make their spot buys for cable in the same way they do for broadcast TV. "CAB is helping toward that uniformity in cable reach and frequency," he added.

There's a strong demand for such information by ad agencies who are very interested in cable but perceive it still to be at a young stage without adequate data. "We're now getting that consistency," Sims said.

Some national cable spot rep firms report healthy increases for 1989 and forecast similar hikes for next year.

In 1990, Cable Networks Inc., currently serving 315 systems, is looking at doing \$36-\$40 million in revenue, coming off this year at close to \$30 million, according to Peter Moran, CNI senior vice president. In 1988, CNI did \$18 million.

"The markets are unifying under one rep firm. This has eliminated confusion and driven business. It has been the year of the interconnect," said Moran, citing new interconnects starting up or expanding into other systems in Tampa, Dallas, San Francisco, New York, Cleveland, Atlanta, Nashville and Orlando.

National Cable Advertising, in more than 80 TV markets representing more than 15 million cable households, also is forecasting a pretty strong year for 1990.

"A lot of advertisers are looking at us very closely," said NCA President Bob Williams. "Agencies for years used to listen to us politely but

didn't take us seriously. Now they're actively figuring out how to plan (for cable)," he added.

Williams estimated NCA's business in 1990 will increase 30 percent. This year, excluding interconnect and sports business, the rep firm will generate \$18-\$20 million in out-bound sales, "pure spot cable."

This past third quarter was soft, due to a weak automotive category, Williams pointed out, attributing the slackening to the recent change in the sales tax law resulting in new car purchases no longer being allowed as deductible. However, he's optimistic that the category will bounce back.

Williams said the cable advertising business has benefitted from the continuing consolidation of ownership, with the larger MSOs instituting company-wide local ad programs so that systems of "any decent size" will sell spots in the near future if they're not doing it already.

Generally, MSOs leave it to the systems to determine for themselves whether they'll sell the spots in-house or commission a regional or national rep firm to do it for them, Williams added.

The Television Bureau of Advertising, which doesn't forecast cable television performance, estimates that broadcast TV revenues will grow 7.1 percent in 1990, based on indicators pointing to a stable and strong economy.

The TvB forecasts: local TV up 6-8 percent; spot TV, up 5-7 percent; network TV, up 6-8 percent; and syndication, up 15-17 percent.

"These increases compare favorably with an anticipated 6.2 percent rise in the GNP and an increase in the Consumer Price Index of 4.6 percent, continuing to outpace the inflation rate." TvB said. ■

Importunate as that bid may have been, it did not slow Cablevision's acquisitiveness. Last May, the company closed on a revolutionary deal to acquire cable systems in Arizona from Republic Cable Partners for \$147.5 million, then turned around and struck a deal to swap those properties with Times Mirror in exchange for Times Mirror systems in New York and Massachusetts in a tax-free swap that is expected to become a model for subsequent deals throughout an industry eager for alternative means of streamlining operations without bidding up the price of systems.

There are no indications that Cablevision is sitting still. "We still have a fair way to go in this business," Bell says. In the works, sources say, are a bid for the Newark, N.J., system put on the market by the estate of its late owner, Peter Gilbert.

And preliminary indications are that Cablevision is listening to cable operators who want an equity stake in the expansion of its programming operations. Rumors circulating at a recent convention have Comcast Corp. taking a position in the upcoming basic sports service in Philadelphia, although there's no confir-

Stock Market

EXCH	COMPANY	CLOSING QUOTE	CLOSING QUOTE	NET CHANGE	PERCENT CHANGE	P/E RATIO	ANNUAL DIV. YIELD	52 WEEK HIGH	52 WEEK LOW
BROADCASTERS & PROGRAMMERS									
ABC	ACTON	58.00	57.10	-0.90	-1.55	98	2.60	—	0.90
OTC	ADELPHI COMM	28.25	28.25	0.00	0.00	—	0.00	—	28.25
OTC	AMERICAN TELE & COMM	48.00	48.00	0.00	0.00	1.70	3.85	—	21.70
OTC	CABLEVISION SYS (N)	48.00	48.00	0.00	0.00	1.10	0.00	—	47.25
OTC	C-TEC CORP(S)	28.75	28.25	-0.50	-1.74	11	0.00	—	28.25
ABC	CENTURY COMMUNICATIONS	10.75	10.00	-0.75	-6.98	—	0.00	—	10.20
OTC	CONQUEST (N)	28.00	28.00	0.00	0.00	—	0.10	0.00	28.00
OTC	CYN (N)	10.75	10.25	0.50	4.65	—	0.00	—	10.25
NYS	DISNEY(N)	110.00	107.75	-2.25	-2.04	30	0.40	0.30	68.00
ABC	FALCON	20.25	20.00	-0.25	-1.23	—	2.10	0.00	20.10
OTC	FINANCIAL NEWS NET	7.00	6.80	-0.20	-2.86	20	0.00	—	10.00
ABC	GALAXY	20.25	20.00	-0.25	-1.23	70	1.00	0.91	20.00
OTC	HOME SHOPPING NETWORK	10.75	10.25	-0.50	-4.65	17	0.00	—	10.75
OTC	JONES INTERCABLE(N)	10.10	10.00	-0.10	-0.99	—	0.00	—	10.00
ABC	JONES INTERCABLE (N)	10.10	10.00	-0.10	-0.99	11	1.00	0.74	10.00
NYS	KNIGHT-RIDDER INC	20.00	20.25	0.25	1.25	20	1.20	2.20	20.25
OTC	NCA	20.25	20.00	-0.25	-1.23	30	0.00	1.00	20.00
OTC	MEDIA GENERAL	20.25	20.00	-0.25	-1.23	20	0.00	1.00	20.00
OTC	MULTIMEDIA	20.25	20.00	-0.25	-1.23	20	0.00	1.00	20.00
OTC	NORFOLK CHANNEL	2.00	1.75	-0.25	-12.50	—	0.00	—	0.00
ABC	NEW YORK TIMES	20.10	21.10	1.00	4.97	10	0.40	1.04	20.00
NYS	PLAYBOY ENTERPRISES(N)	17.00	17.25	0.25	1.47	100	0.00	—	17.25
OTC	QV	17.00	16.50	-0.50	-2.94	—	0.00	—	16.50
OTC	SCIPPS HOWARD BRIDGY	74.00	74.00	0.00	0.00	—	1.00	1.20	74.00
OTC	TCA CABLE TV	17.00	16.50	-0.50	-2.94	67	0.00	0.11	17.00
OTC	TELE-COMMUNICATIONS	16.00	16.00	0.00	0.00	—	0.00	—	16.00
OTC	TIME INC.	17.00	16.00	-1.00	-5.88	20	1.00	0.70	16.00
NYS	TIMES MIROR	20.10	20.75	0.65	3.23	10	1.00	2.00	20.00
ABC	TRIUMPH CO.	16.00	17.00	1.00	6.25	20	0.00	1.54	16.00
ABC	TURNER BROADCASTING	48.00	48.00	0.00	0.00	—	0.00	—	48.00
OTC	UNITED ARTISTS ENTERTN	20.00	20.00	0.00	0.00	30	0.00	—	20.00
OTC	WACOR	17.00	17.00	0.00	0.00	—	0.00	—	17.00
OTC	WARRIOR COMM	20.25	20.00	-0.25	-1.23	—	0.00	—	20.00
NYS	WASHINGTON POST	20.25	20.00	-0.25	-1.23	10	1.00	0.60	20.00
OTC	WIDEORBIT(S)	20.25	20.00	-0.25	-1.23	10	1.00	0.60	20.00
OTC	WESTERN(S)	20.25	20.00	-0.25	-1.23	10	1.00	0.60	20.00
SERVICE & FINANCIAL COMPANIES									
OTC	BURNUP & BOW	20.10	20.00	-0.10	-0.50	20	0.00	0.00	20.00
NYS	CAPITAL CITY	20.00	20.00	0.00	0.00	10	0.00	0.00	20.00
OTC	PARAMOUNT	20.10	20.00	-0.10	-0.50	20	1.00	2.00	20.00
MANUFACTURING & DISTRIBUTORS									
OTC	ARTIS	7.75	7.75	0.00	0.00	—	0.00	—	7.75
NYS	ARVIN	10.00	10.00	0.00	0.00	10	0.00	0.70	10.00
OTC	AUGCO	10.00	10.00	0.00	0.00	10	0.00	0.44	10.00
OTC	CABLE EXCHANGE	17.75	17.75	0.00	0.00	—	0.00	—	17.75
OTC	C-COR ELECTRONICS	14.20	14.20	0.00	0.00	30	0.00	—	14.20
OTC	CONTEL CORP.	20.25	20.00	-0.25	-1.23	60	2.00	0.00	20.00
OTC	GANDOLF TECH	6.00	6.00	0.00	0.00	10	0.00	—	6.00
NYS	GENERAL INSTRUMENT	10.00	10.00	0.00	0.00	10	0.00	1.00	10.00
OTC	GRAPHIC SCANNING	11.00	11.00	0.00	0.00	—	0.00	—	11.00
NYS	HARRIS CORP(S)	27.00	27.00	0.00	0.00	10	0.00	2.00	27.00
OTC	ISA-COM	6.75	6.75	0.00	0.00	10	0.00	1.00	6.75
NYS	OAK INDUSTRIES	1.00	1.00	0.00	0.00	10	0.00	—	1.00
OTC	PICO PROD(US)	1.00	1.00	0.00	0.00	—	0.00	—	1.00
OTC	PIONEER ELECTRONICS(S)	10.00	10.00	0.00	0.00	20	0.00	0.21	10.00
OTC	RADIATION SYSTEM(S)	10.00	10.00	0.00	0.00	10	0.00	0.00	10.00
ABC	RMS INTERNATIONAL	6.00	6.75	0.75	12.50	10	0.00	0.00	6.00
OTC	SCIENTIFIC-ATLANTA(S)	20.25	20.00	-0.25	-1.23	10	0.00	0.00	20.00
OTC	SEGENER	3.00	3.00	0.00	0.00	20	0.00	—	3.00
OTC	TECHTRON	10.00	10.00	0.00	0.00	10	0.00	1.00	10.00
OTC	VIRAH ASSOCIATES	10.00	10.00	0.00	0.00	10	0.00	1.00	10.00
OTC	WAVETEX	4.00	4.00	0.00	0.00	—	0.00	—	4.00

Subscriber Count

Satellite national services

Basic services

	Affiliates	Subscribers
ACTS Satellite Network	387	9,000,000
Alternate View Network	300	4,500,000
Arts & Entertainment Network (A&E)	3,700	39,673,000
Black Entertainment Television	1,800	24,218,000
CNBC	700	13,000,000
Cable News Network	11,860	51,527,000
Cable Value Network	1,800	23,300,000
C-SPAN	3,341	46,600,000
C-SPAN II	651	18,300,000
Country Music Television	1,092	9,124,974
The Discovery Channel	5,324	44,600,000
Eco/Galavision	300	1,000,000
ESPN	20,500*	53,400,000
Eternal Word Television Network	490	10,800,000
The Family Channel	8,424	45,734,000
Family Guide Network	60	4,500,000
FamilyNet	388	3,700,000
The Fashion Channel	650	10,100,000
Financial News Network	3,500	31,219,000
FNN/Score	1,600	20,000,000
Headline News	3,410	37,727,000
Home Shopping Network	1,488	16,928,895
Home Shopping Network II	384	6,796,525
The Inspirational Network	920	9,500,000
International Television Network	25	7,868,900
J.C. Penney TV Shopping Channel	119	5,100,000
KTVT	417	3,600,000
The Learning Channel	1,142	17,500,000
Lifetime	3,800	44,177,000
Mind Extension University	156	4,900,000
MTV	5,405	47,137,000
Movietime	447	14,000,000
The Nashville Network	8,318	45,923,000
National College Television	147	5,800,000
Nick At Nite	3,440	39,600,000
Nickelodeon	6,600	47,183,000
The Nostalgia Channel	389	5,800,000
Prevue Guide	475	12,300,000
QVC Network	1,000	14,100,000
RFD TV	30	2,182,190
Silent Network	189	13,600,000
SportsChannel America**	N.A.	1,500,000
TBS Superstation	9,426	50,582,000
Telemundo***	5	160,000
TNT	3,200	33,500,000
The Travel Channel	659	11,000,000
Trinity Broadcasting Network	725	9,100,000
Univision***	500	509,500
USA Network	10,100	48,427,000
VH-1	2,530	32,390,000
Vision Interfaith Satellite Network	315	6,200,000
The Weather Channel	3,650	39,051,000
WGN-TV	11,415	24,900,000
WWOR-TV	2,600	12,500,000
WPIX-TV	858	9,678,474
WSBK-TV (new)	57	350,808

Bonus/basic services

American Movie Classics	1,700	20,000,000
Bravo	375	2,500,000

Pay services

American Exxstasy	35	27,000
Cinemax	3,650	6,600,000
The Disney Channel	5,700	4,337,300
Home Box Office	7,400	17,000,000
The Movie Channel	3,250	2,700,000
The Playboy Channel	526	470,000
Showtime	6,000	6,600,000

Audio services

AEI Lifestyle	142	2,578,838
AEI StarTracks Vocal Hits	26	854,390
Cable Radio Network	59	2,500,000
Galactic Radio	102	3,000,000
KKGO Super Jazz	18	133,639
Mordy Bible Institute	63	1,058,368
Satellite Radio Network	237	483,000
Tempo Sound	125	1,250,000
WMT Chicago	170	1,259,804

Text services

AP News Cable	185	2,500,000
AP Business Plus	54	1,400,000
AP News Plus	75	2,100,000
Cable SportsTracker	45	1,333,000
EPG	280	6,800,000
EPG Jr.	312	320,000
Genesis Storytime	39	1,550,000

Reuters NewsView	127	2,437,000
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Computer services

DBC/MarketWatch	462	9,200,000
X*Press Executive	487	14,000
X*Press X*Change	487	14,000

Non satellite-fed national services

Basic services

	Affiliates	Subscribers
Cable Video Entertainment	190	18,000,000
Consumer Classified Ad Network	3	195,000
Fuji Network	3	12,000
Vector Consumer News	5	200,000
Vector Consumer Shopping Guide	9	325,000

Pay services

Nippon Golden Network	5	13,600
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Interactive services

Basic services

	Affiliate	Subscribers
Video Jukebox Network	22	1,950,000

Regional services

Basic services

	Affiliates	Subscribers
Arizona Sports Programming Network	N.A.	210,000
Atlanta Interfaith	7	180,000
Bay Area Religious Channel	6	113,000
Cable TV Network of New Jersey	34	1,396,451
The Ecumenical Channel	9	170,000
KBL Entertainment Network	67	1,200,000
Life Newvision	35	50,000
Madison Square Garden Network	120	3,400,000
Meadows Racing Network	14	600,000
News 12 Long Island	4	594,000
Midwest Sports Channel (new)	90	400,000
Niagara Frontier Sports Network	13	800,000
Northwest Cable Sports Network	3	700,000
Pennarama	28	750,000
Prime Cable	9	381,938
Prime Sports Network	11	300,000
Prime Ticket	115	3,500,000
SportsChannel (Chicago)	50	1,507,270
SportsChannel (Ohio)	2	500,000
Sunshine Network	200	2,310,000

Pay services

Home Sports Entertainment	250	1,000,000
Home Team Sports	160	1,400,000
New England Sports Network	171	317,201
Prism	87	427,000
Pro-Am Sports	173	523,000
SportsChannel (Florida)	22	650,000
SportsChannel (Los Angeles)	76	125,000
SportsChannel (New England)	154	1,700,000
SportsChannel (New York)	100	1,300,000

Note: Figures for affiliate/subscriber counts will be updated quarterly unless information is provided by the service. Send information to: CableVision, Cable Stats, 245 Park Avenue South, 8th Floor, New York, NY 10010.

N.A. denotes information not available.

*Includes MMDS and SMATV systems

**Court represents standalone affiliates/subscribers; portions of SC America are carried on Home Team Sports and the SportsChannel family of regional services.

***Spanish-speaking households.

Announced services

Satellite-fed services

	Expected launch
American Western Network	1st Quarter 1990
The Asia Network	4th Quarter 1989
Career Channel Network	10/89
CD/DMA The Digital Music Network	4th Quarter 1989
The Computer Channel	4th Quarter 1989
Cowboy TV Network	5/90
Digital Cable Radio	12/89
Digital Radio Channel	4th Quarter 1989
The Gaming Network	9/90
The Global Channel	1st Quarter 1990
Global Village Network	3rd Quarter 1990
HA TV Comedy Network (MTV)	4/90
HBO Comedy Channel	11/89
The How-To Channel	2nd Quarter 1990
Interactive Game Network	4th Quarter 1989
Kids Information Network	4th Quarter 1989
Maximum Entertainment Network	4th Quarter 1989
Midwest Sports News Network	11/89
Music Image Channel	11/89
Prime Network	4th Quarter 1989
QVC/CNN Network II	2/90
The Sci-Fi Channel	4th Quarter 1990
Talk Television	4th Quarter 1989

Non satellite-fed services

	Expected launch
ACTV	4th Quarter 1989
Main Street	4th Quarter 1989
On Demand/UTV TV Network	4th Quarter 1989